



# EEO-1 Survey User's Guide

Version 1.0

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# Starting Your EEO-1 Survey

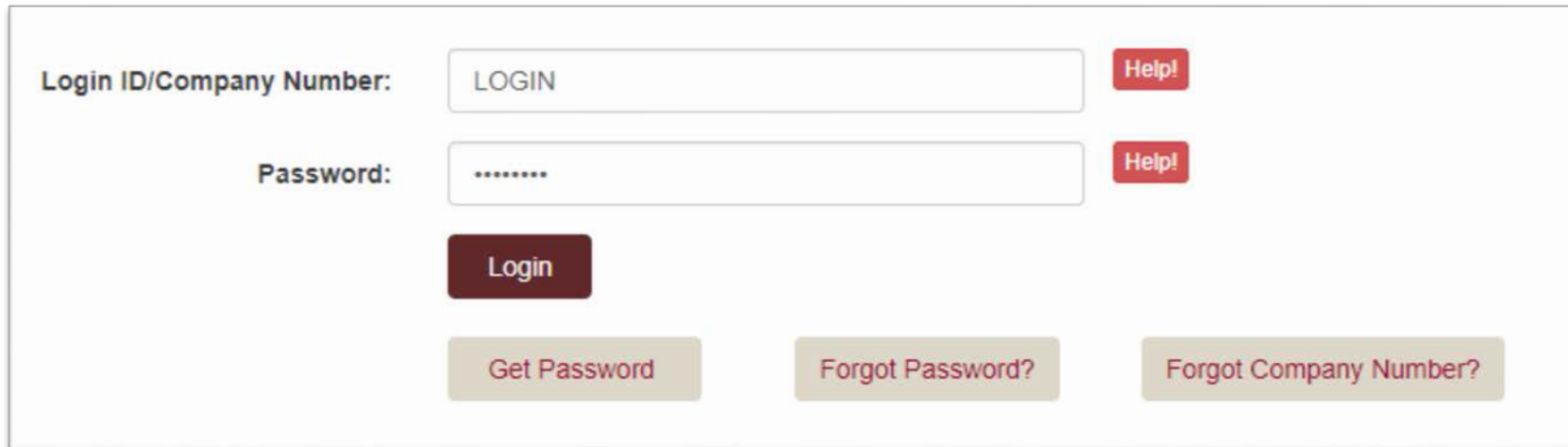
Screens 4 – 16

# Step 1: Starting Your EEO-1 Survey

Screen 5

## Navigate to login page

To begin filing your survey proceed to the EEO-1 login page here:  
<https://egov.eeoc.gov/eeo1/login.jsp>

A screenshot of the EEO-1 login page. It features a login form with two input fields: 'Login ID/Company Number:' and 'Password:'. The first field contains the text 'LOGIN' and has a red 'Help!' button to its right. The second field contains seven dots and also has a red 'Help!' button to its right. Below the password field is a dark red 'Login' button. At the bottom of the form are three light gray buttons: 'Get Password', 'Forgot Password?', and 'Forgot Company Number?'.

Login ID/Company Number:  [Help!](#)

Password:  [Help!](#)

[Login](#)

[Get Password](#) [Forgot Password?](#) [Forgot Company Number?](#)

**\*If your company is filing for the first time, refer to [Screens 107 – 116](#).**



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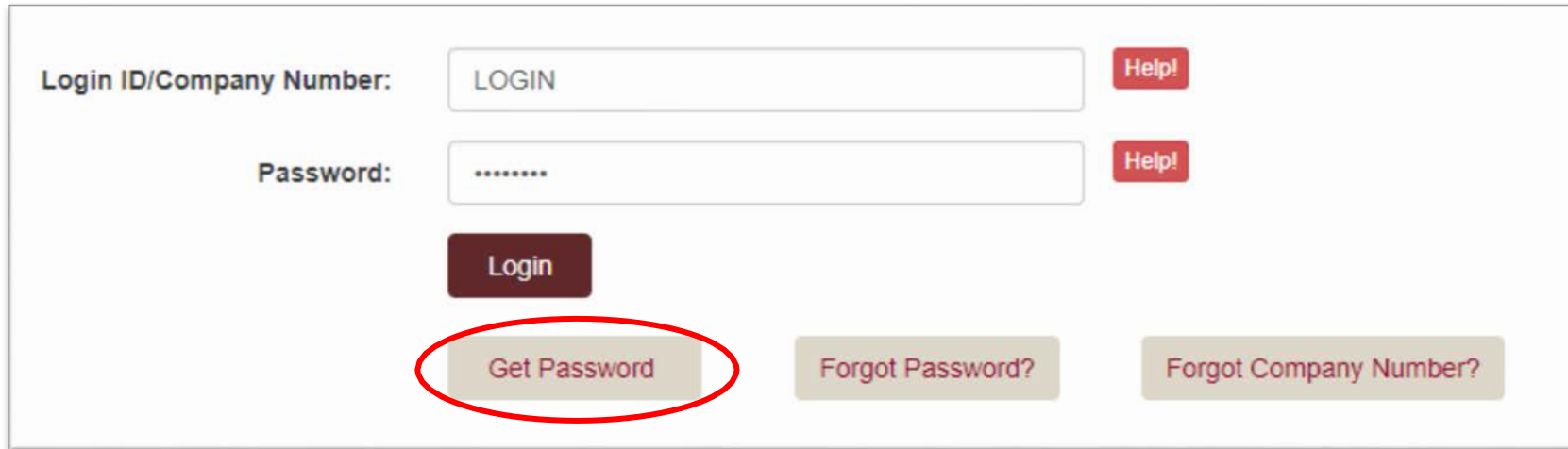
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# Step 2: Starting Your EEO-1 Survey

Screen 6

## Get password

Your password changes every year To create a new password for the current survey year, click the “Get Password” button.



The screenshot shows a login form with the following elements:

- Login ID/Company Number:** A text input field containing "LOGIN" and a red "Help!" button to its right.
- Password:** A text input field containing "\*\*\*\*\*" and a red "Help!" button to its right.
- Login:** A dark blue button located below the password field.
- Get Password:** A light blue button located below the "Login" button, circled in red.
- Forgot Password?:** A light blue button located to the right of the "Get Password" button.
- Forgot Company Number?:** A light blue button located to the right of the "Forgot Password?" button.



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# Step 3: Starting Your EEO-1 Survey

Screen 7

## Get password

Enter your Company Number/Login ID below. A link for resetting your password will be emailed to your company's Contact Person.

Company Number

Email Address

[Send Password Reset Link](#)

Input your company number/login ID into the field and click “Send Password Reset Link.”



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## Get password

At this point your contact person will receive an email with a link to create your password.

Click the link in the email (URL will be unique to you). You will be taken to a page where you can reset your password.



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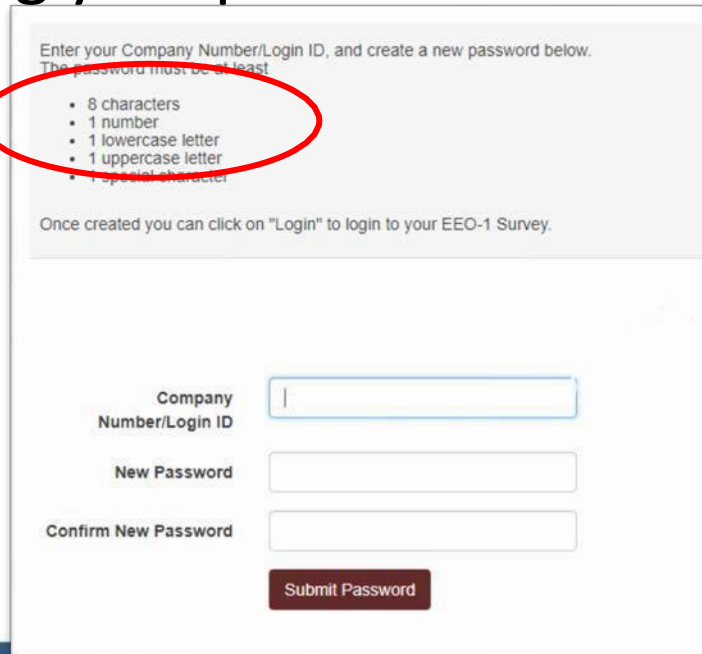
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Email: [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov)



## Get password

Enter your company number/login ID, and create your new password. Rewrite your new password in the “Confirm New Password” field, then click “Submit Password” to finish resetting your password.

**Make sure to follow these password specifications**



Enter your Company Number/Login ID, and create a new password below.  
The password must be at least

- 8 characters
- 1 number
- 1 lowercase letter
- 1 uppercase letter
- 1 special character

Once created you can click on "Login" to login to your EEO-1 Survey.

Company Number/Login ID

New Password

Confirm New Password



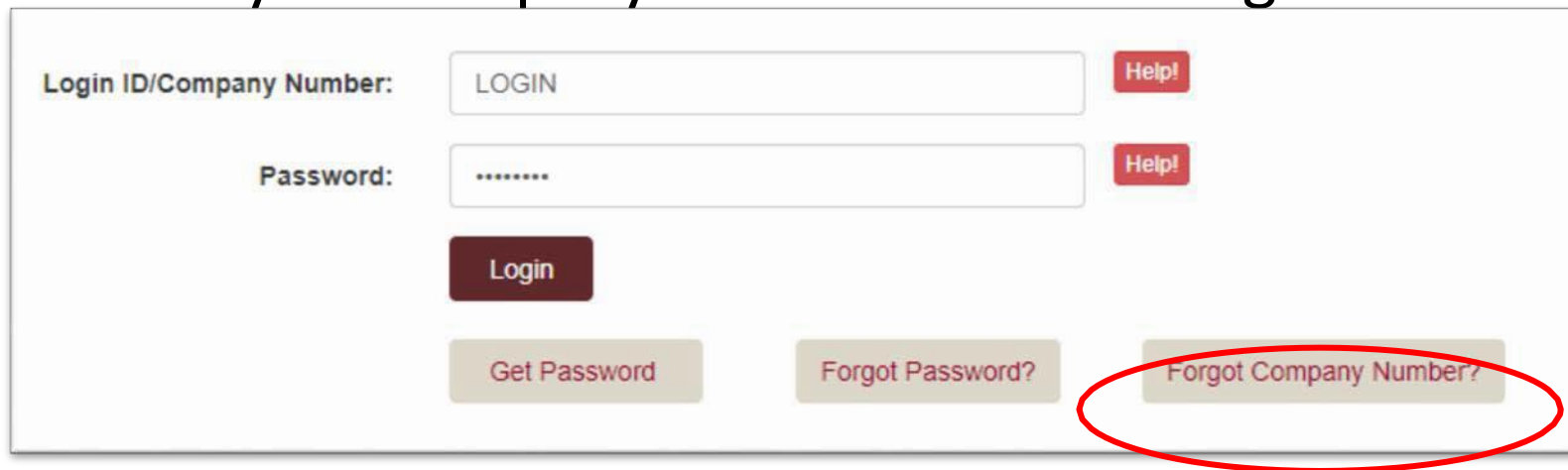
# Step 6: Starting Your EEO-1 Survey

Screen 10

## Forgot company number

The company number/login ID can be obtained from your EEO-1 notification letter. This company number remains the same from year to year.

You can also obtain your company number from the login screen.



The screenshot shows a login interface with the following elements:

- Login ID/Company Number:** A text input field containing the word "LOGIN". To its right is a red "Help!" button.
- Password:** A text input field containing seven asterisks "\*\*\*\*\*". To its right is a red "Help!" button.
- Login:** A dark blue button located below the password field.
- Get Password:** A light blue button located below the login button.
- Forgot Password?:** A light blue button located to the right of the "Get Password" button.
- Forgot Company Number?:** A light blue button located to the right of the "Forgot Password?" button. This button is circled in red.

Click the “Forgot Company Number?” button.



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# Step 7: Starting Your EEO-1 Survey

Screen 11

## Forgot company number

Enter your company name, company's primary zip code, and your contact person's email address. Your company number will then be emailed to your company's contact person.

Company Name:

Zip Code:

EEO-1 Contact Person Email ID:

Fill in your company's name, zip code, and contact person's email address. The contact person's email is the email we have on file for your company and is where your company number/login ID information will be sent, once you click "Submit."



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## Contact person

You may change your Contact Person Email ID by sending the EEOC a signed change request on company letterhead with the company number/login ID (if known), name, title, phone number and email address of the new contact person at your company. This change request **MUST** be signed by an authorized company representative (anyone in your company authorized to sign documents) in order for the change request to be processed.

Please either scan and email this request to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) or fax to 1-866-262-0032. Your new contact will receive an email with a link to create your new password once your change request has been submitted. If you have any questions about this process you may contact the EEOC at 1-877-392-4647 or [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov)



## Logging in

Enter the company number/login ID and the password into their respective cells.

Login ID/Company Number:	<input type="text" value="LOGINID"/>	<a href="#">Help!</a>
Password:	<input type="password" value="Password"/>	

## NOTE

Your 2016 password will NOT work in 2017. You MUST get a new password for the 2017 survey (see [Screens 6 – 9](#)).

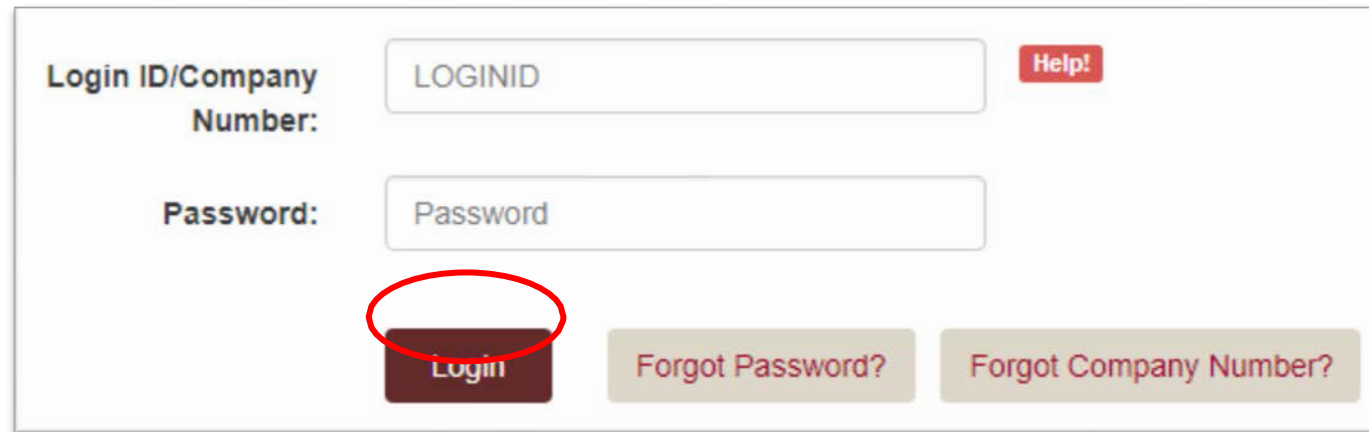


# Step 9: Starting Your EEO-1 Survey

Screen 14

## Logging in

Once all the information has been entered click the “Login” button.



Login ID/Company Number: LOGINID [Help!](#)

Password: Password

[Login](#) [Forgot Password?](#) [Forgot Company Number?](#)

## NOTE

After a 5<sup>th</sup> failed attempt, a warning will be displayed. After 8 failed attempts, the system will be locked. Click “Forgot Password?” to reset your password.



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## Logging in

When logging in for the first time, or if you are logging in from a different computer or browser than previously used, you will be directed to an authentication page. At this time a one time verification code will have been sent to the contact person's email. Enter this code in the cell.

One Time Code:

[Request for another One Time Code.](#)

One Time Code is sent to your email address, Please check and enter above.

Security Preference: Would you like us to remember this Computer? [?](#)

☐ **Yes, remember this Computer.**  
Trust this Computer when I sign in.

Check “Yes, remember this Computer” to avoid this step in the future.

Press Submit to proceed.





### Logging in

Upon proceeding you will be presented with the Standards and Rules of Behavior for the 2017 EEO-1 Survey. After reading it, check the box and press next to accept the conditions and comply with the rules and proceed further with the survey.

Standards and Rules of Behavior for the use of the U.S. Equal Employment Opportunity Commission (EEOC) EEO-1 data collection system.

Access to and continued use of EEO-1 is granted on the condition that each user read and follows the Commissions policies concerning the use. Hereafter, use of this system is dependent upon the user following this guidance:

1. Access to the EEO-1 is controlled. Requests for access must be justified based on job requirements. The system is to be used only for the purposes of filing your company's EEO-1 report(s) and the retrieval of EEO-1 reports filed in previous years.
2. Accounts are provided to permit access only to authorized users for authorized purposes. Unauthorized use of a user account includes, but is not limited to: the use of a user account to access EEO-1 data by any person other than the authorized user; attempts to retrieve or modify information that is not your own; and destruction or tampering with government information. Users shall not seek information on data, files or passwords belonging to others, or otherwise attempt to gain unauthorized access to EEOC systems.
3. The system is only to be accessed using the procedures prescribed by the U.S. EEOC and only by using the Login ID and Password and provided by the U.S. EEOC.
4. Any use of the system which disrupts the operation or use of the system is prohibited.
5. Users shall not do any unauthorized security scanning, monitoring, or data interception, nor should they interfere with the conduct of security measures (such as anti-virus or auditing).
6. Unauthorized access or use may be subject to civil and criminal penalties for computer fraud or abuse. If you suspect or become aware of unauthorized use or access, you must notify the U.S. Equal Employment Opportunity Commission IMMEDIATELY by telephone, 1-877-392-4647 (toll-free); fax: 202-663-7185 or email: [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov).

☐ I accept these conditions and will comply with these rules.



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# Preliminary Information Collection

Screens 17 – 27

Now that you have logged in, you will provide some preliminary information. This information will update any major changes to your company since the previous EEO-1 survey.

## User identification

Provide the name and title for the company official who is certifying your survey.

A certifying official refers to any employee in your company tasked with certifying your submitted survey information.

Certifying Official	
Name*	Title*
<input type="text"/>	<input type="text"/>
Contact Person Regarding this report	
Name*	Title*
<input type="text"/>	<input type="text"/>
Telephone Number(including Area Code)*	Extension (Optional)
<input type="text" value="(XXX) XXX-XXXX"/>	<input type="text"/>
Email*	
<input type="text"/>	



## User identification

Provide the name, title and contact information for your company's contact person.

The contact person is the individual whose e-mail is linked with the EEO-1 survey and is your company's contact for the EEO-1 Joint Reporting Committee.

Certifying Official	
Name* ⓘ	Title* ⓘ
<input type="text"/>	<input type="text"/>
Contact Person Regarding this report	
Name* ⓘ	Title* ⓘ
<input type="text"/>	<input type="text"/>
Telephone Number(including Area Code)* ⓘ	Extension (Optional) ⓘ
<input type="text" value="(XXX) XXX-XXXX"/>	<input type="text"/>
Email* ⓘ	
<input type="text"/>	



# Step 2: Preliminary Information

Screen 20

## Company identification

Enter your company's Employer Identification Number (EIN). Enter the Dun and Bradstreet number (if applicable). If you need to update the address, begin by entering the full address in the "Address" cell. As you enter your address, suggested addresses will be provided. Continue to add information until the correct address appears in the drop-down list. Click on this address to continue. If the correct address does not appear, or if you are entering a PO Box, click on "Manual Address Entry" and enter the address in the provided cells.

The screenshot shows a web form titled "Establishment for which this report is filed". It contains two main input fields: "TEST SITE" and "Employer Identification Number (EIN)" with the value "26-6666666". Below these is a section for "Address" with a note: "If you need to update the establishment's address, begin by entering the full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, or if you are entering a PO Box, please click on 'Manual Address Entry' and enter the address in the provided cells." The address section includes a large text area for "Address (number and street) - Note: Second line is optional.", a smaller text area for "Address 2 (Optional)", and four dropdown menus for "City or Town", "County", "State", and "Zipcode". At the bottom of the address section is a button labeled "Manual Address Entry", which is circled in red.

Click this to input address manually



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# Step 3: Preliminary Information

Screen 21

## Survey eligibility

You must answer all of the questions to continue.

1. Does the entire company have at least 100 employees in the payroll period for which you are reporting?

☒ Yes ☐ No

2. Is your company affiliated through common ownership and/or centralized management with other entities in an enterprise with a total employment of 100 or more?

☒ Yes ☐ No

3. Does the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to \$50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes?

☐ Yes ☐ No

If the response to the above question (C - 3) is Yes, please enter your Dun and Bradstreet identification number (if you have one):

Q1: Select “Yes” if your company has at least 100 employees for the current payroll period of which you will be reporting. Select “No” if this is not the case.

Q2: Select “Yes” if your company is affiliated with another company through common ownership/centralized management, bringing the total employment to at least 100. Select “No” if this is not the case.

Q3: Select “Yes” if your company has at least 50 employees AND has a government contract of at least \$50,000 (or is a financial institution). Select “No” if this is not the case.



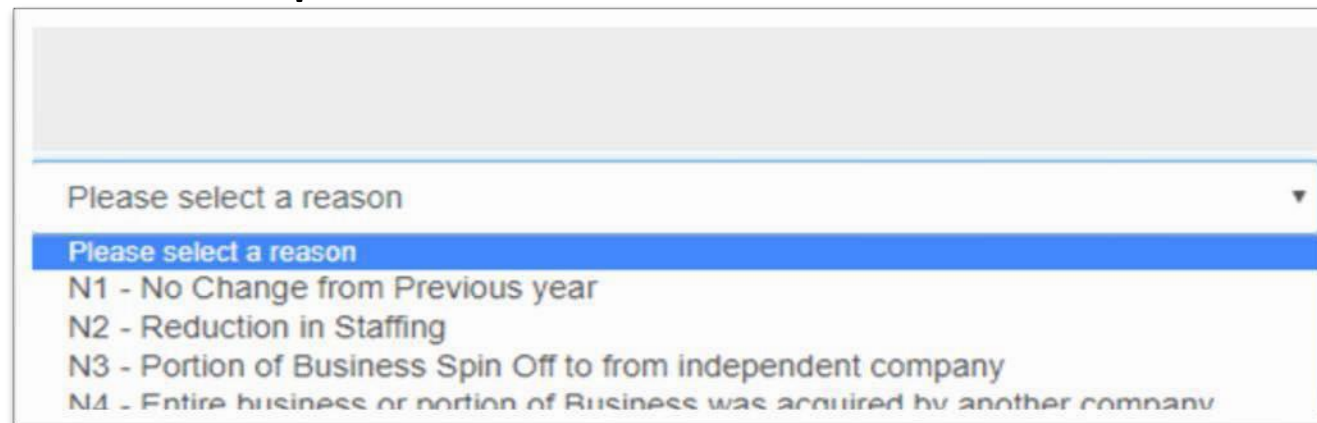
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## Survey eligibility

If you selected “Yes” to any one of the above questions, you will be eligible to complete the survey. Continue to [Screen 24](#). \*If you are a single-establishment company go to [Screen 75](#).

If you selected “No” to all three questions, give reasons by selecting from the drop down menu and proceed to [Screen 23](#).



The screenshot shows a web form with a dropdown menu. The menu is open, displaying a list of reasons for not completing the survey. The text "Please select a reason" is visible at the top of the dropdown list, followed by four options: "N1 - No Change from Previous year", "N2 - Reduction in Staffing", "N3 - Portion of Business Spin Off to from independent company", and "N4 - Entire business or portion of Business was acquired by another company".

Please select a reason ▼

- Please select a reason
- N1 - No Change from Previous year
- N2 - Reduction in Staffing
- N3 - Portion of Business Spin Off to from independent company
- N4 - Entire business or portion of Business was acquired by another company





## Survey eligibility

Certifying Official	LINDSAY GREENSTONE
Title	SR HRIS
Total Number of Reports	3
Total Number of Closed Establishment	4

☐ Check this box if you feel that your company will not meet the criteria for next year's survey. You will NOT receive EEO-1 survey material in the mail.

Certification
<input type="checkbox"/> All statements are accurate and were prepared in accordance with the instructions.
<input type="button" value="Cancel"/> <input type="button" value="Certify"/>

All reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.

If you answered “No” to all of the survey eligibility questions, you will not be required to complete the reporting year’s survey.

Verify that all the information listed in this screen is correct. Check the box if you think your company will not meet the criteria to report next year.

Finally, check the box under “Certification” to confirm that everything is accurate. Click the “Certify” button to complete your report for the year.



## Updating closed establishments

1. Has your company closed any establishments since last survey filling?

☐ Yes ☐ No

On this screen you will provide the answer regarding the status of your establishments.

If any establishments have closed or are no longer in operation since the previous survey, you will select “Yes” and proceed to [Screen 25](#).

If no establishments have closed since the previous survey you will select “No” and proceed to [Screen 27](#).



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# Step 4-A: Preliminary Information

Screen 25

## Updating closed establishments

You will be presented with a list of establishments from the previous year's survey. Please select all establishments that should be removed and not included in the current year's survey.

<input type="checkbox"/>	4	GX9119	EUREST SECTOR 9356	1465435	NY	SKANEATELES FALLS
Please select a primary reason ▼						
<input type="checkbox"/>	4	GX9120	WOLFGANG PUCK CATERING SE 20367	86451	CA	LOS ANGELES
Please select a primary reason ▼						
<input type="checkbox"/>	4	GX9121	CHARTWELLS SECTOR 11989	601 W STADIUM BLVD	MI	ANN ARBOR
Please select a primary reason ▼						
<input type="checkbox"/>	4	GX9122	CHARTWELLS SECTOR 18418	1005 STATE STREET	IL	EAST SAINT LOUIS
Please select a primary reason ▼						
<input type="checkbox"/>	4	GX9123	BON APPETIT SECTOR 18169	56255	OH	CLEVELAND
Please select a primary reason ▼						



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## Updating closed establishments

If your company has closed establishments since the previous filing year, select the option that best explains why it has closed.

Check closed location	Type	Establishment Number
<input type="checkbox"/>	4	GX9085
<div>Please select a primary reason ▼</div> <div><div>Please select a primary reason</div><div>Establishment Closed/Establishment in Out of Business</div><div>The Establishment is now spun-off and is now independent of this company</div><div>Closed as Type-4 and Required in Type-6</div><div>This Establishment was consolidated into another Establishment</div><div>This Establishment was involved in an acquisition or merger.</div></div>		
<div>Please select a primary reason ▼</div>		



## Selecting a filing method

Select one of the following methods for completing your EEO-1 Survey.



**EEO1 Survey Data Filing Option**

Do you want to file the application online or upload file?

☐ Complete Online form

☐ Upload Data File

Cancel Next

“Complete Online Form” refers to filing via the online form. You will enter data manually into fillable cells. See [Screens 61 – 106](#).

“Upload Data File” refers to filing via data file transfer. Filing with this method involves uploading a file prepared on your Human Resource Information System (HRIS) into the EEO-1 Survey system. See [Screens 28 – 60](#).



# Filing Via the “Upload Data File Method”

Screens 28 – 60

[Screens 61 – 106](#)

If “Complete Online Form” was selected, use [Screens 61 – 106](#) instead.



## Downloading your establishment listing

Before generating the upload file, you should first update the establishment numbers in your HRIS. You can download an establishment listing from your company's EEO-1 online database.

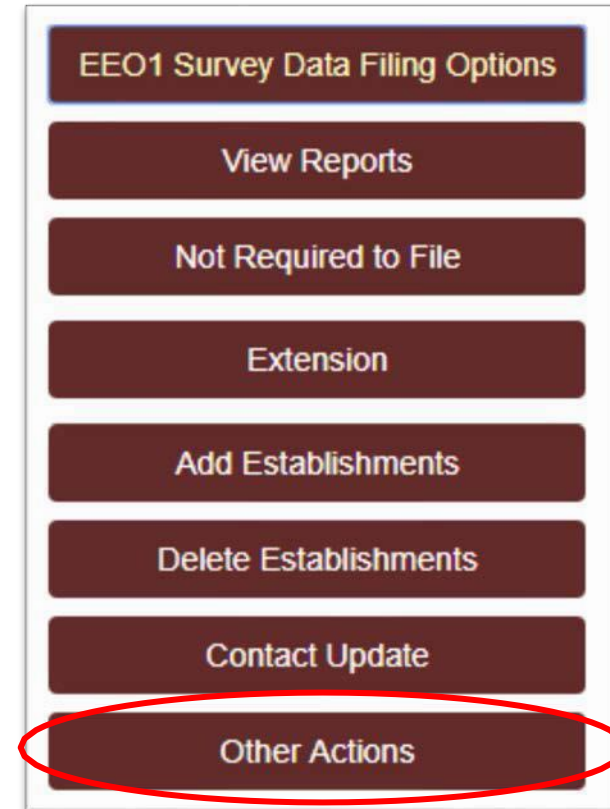
If you have already updated your establishment numbers, proceed to [Screen 35](#).





## Downloading your establishment listing

After logging in, click “Other Actions.”



## Downloading your establishment listing

Under “Present Year Reports,” click “All Establishments.”

Utilities	
Uncertify	Uncertify reports.
Convert	Convert from a single-establishment employer to a multi-establishment employer.
Previous Year Reports	
New Establishment	Listing of all establishments filed for the first time in the previous year.
All Establishments	Listing of all previous year establishments.
Present Year Reports	
All Establishments	Listing of all establishments in the present year.
Check Totals	Present year employee totals for all establishments.



## Downloading your establishment listing

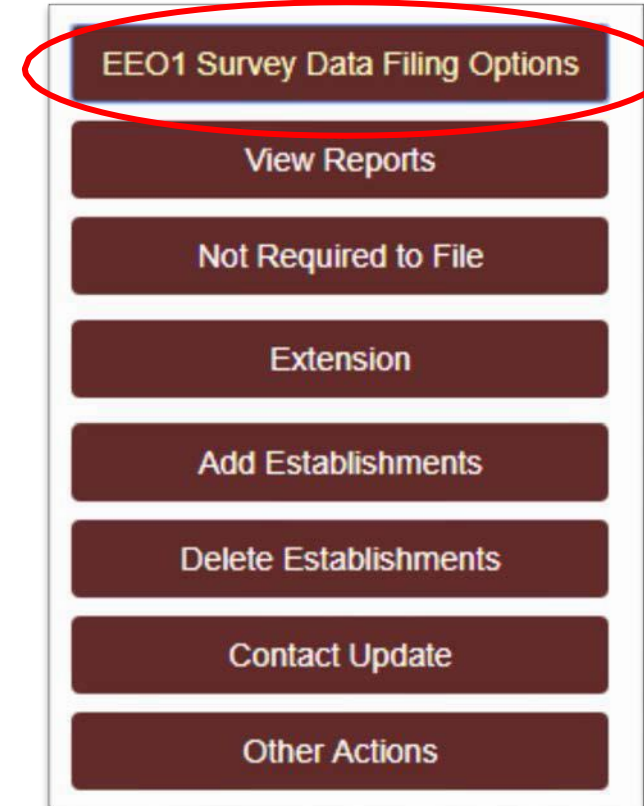
A list of your current establishments will appear Establishment numbers are to the left of each establishment, which you may refer to when ensuring that the numbers match with the numbers in your company's HR filing system.

List of All Present Year Establishments									
<div>BackPrintDownload to Excel</div>									
Estb #	Type	Establishment Name	Street	City	State	Zip	County	NAICS	Total
GX94201	2	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	95369	MERCED		
GX94201	3	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	95369	MERCED		



## Navigating to the upload screen

On the main menu screen after you log in, click “EEO1 Survey Data Filing Options.”



## Navigating to the upload screen

**EEO1 Survey Data Filing Option**

Do you want to file the application online or upload file?

☐ Complete Online form

☐ Upload Data File

[Cancel](#) [Next](#)

Select “Upload Data File,” then click “Next.” Answer the questions that follow.





## Navigating to the upload screen

EEO1 Data files must be tested before they can be uploaded to production. The following process tests the file and once validated, it allows you to upload the file directly to production. Post testing, you might see errors and/or warnings messages. You have to fix the errors before the data can be moved to production. Kindly note that uploading the file here is not the final submission.

Please answer the questions below to proceed.

1. Have you updated the Establishment Numbers in your HR system PRIOR to creating and uploading the data file?

☐ Yes ☐ No

If you answered “No,” the system will not let you continue. You must update the establishment numbers in your HRIS before uploading (see [Screens 29 – 32](#) for help with this).



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## Navigating to the upload screen

2. Has your company experienced a merger or any acquisitions?

☐ Yes ☐ No

If you answered “Yes,” the system will not let you continue. Mergers and acquisitions should be handled prior to uploading your file. Send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV) regarding the details of the acquisition(s) and/or merger(s).

(For more information regarding acquisitions and mergers, see [Screens 118 – 123](#))



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## Navigating to the upload screen

3. Has your company deleted 50 or more locations since the previous year's EEO-1?

☐ Yes ☐ No

If you answered “Yes,” once your file is uploaded, you can close these establishments manually or by emailing a CSV file including establishment numbers of all closed establishments to [EE01.Upload@eeoc.gov](mailto:EE01.Upload@eeoc.gov)



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## Navigating to the upload screen

Once you have answered all of the questions, click “Next” to continue.



Clicking “Cancel” will take you back to the data filing options screen.



## Uploading your file

Select which data file type you will be uploading (click the “Detail” or “Summary” link next to each file type for an example).

### Upload File Here

Step 1: Select the type of data file you are uploading. Type of data file (for definitions see below)

#### Fixed Length

- ☐ DATA FILE 1 [\(Detail\)](#)
- ☐ DATA FILE 2 [\(Summary\)](#)

#### Comma Separated

- ☐ DATA FILE 3 [\(Summary\)](#)
- ☐ DATA FILE 4 [\(Detail\)](#)



## Uploading your file

### **DATA FILE 1**

Data File 1 is a fixed-length file and must be in an ASCII/TXT format.



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## Uploading your file

### DATA FILE 1

For **single-establishment companies**, there will be only one data record in the data file indicated as Type/Status Code-1.

For **multi-establishment companies**, Data File-1 includes data records for Type/Status Codes 2,3,4,9 and 8 (Type/Status Codes 8 are used if the employer is not submitting Type 6 records for the establishments employing fewer than 50 employees). Type/Status Code 9 data records are for establishments reporting for the first time in the current year's EEO-1 survey. Type/Status Code 8 data records are for establishments employing fewer than 50; however, employment data categorized by race/ethnicity, gender and job category must be provided for each Type/Status Code 8 data record.



## Uploading your file

### **DATA FILE 2**

Data File 2 is a fixed-length file and must be in an ASCII/TXT format.



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## Uploading your file

### DATA FILE 2

This file is used for establishments with less than 50 employees. Multi-establishment employers can use this to create Type 6 reports. The file is of fixed length and is usually extracted from the company's payroll system

### NOTE

Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year's survey.



## Uploading your file

### DATA FILE 3

Data File 3 contains the same information as "Data File 2", but is in a **Comma Delimited format (CSV)** that can be created from almost any spreadsheet program. This may be the easiest and quickest way to enter "Type 6 Reports" for Establishments with less than 50 employees.

### NOTE

Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year's survey.



## Uploading your file

### DATA FILE 4

Data File 4 contains the same information as "Data File 1", but is in a **Comma Delimited format (CSV)** that can be created from almost any spreadsheet program.



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# Step 2: Data Upload

Screen 46

## Uploading your file

Click “Choose File” and select the file you want to upload.

Step 2: Select your file (This may take a few minutes depending on the size of your upload. If you are unable to upload a data file this could be due to an issue with you're company's firewall. If you encounter this issue be sure to speak to your Network Administrator or IT professionals to resolve it. )

No file chosen

Step 3: Continue to Next Step



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## Uploading your file

### NOTE

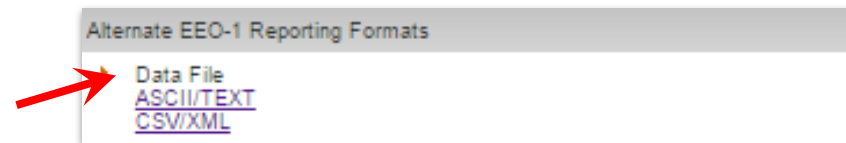
EEOC only accepts the following file formats:

.txt

.CSV

If you are unsure about how to format your data file for upload, or if you want more information about EEO-1 data files, navigate to [www.eeoc.gov/eo1survey](http://www.eeoc.gov/eo1survey) and locate the links under the heading “Data File” in the callout box titled “Alternate EEO-1 Reporting Formats” on the right hand side of the page.

**File format specifications**



## Uploading your file

Navigate to the folder on your computer where your company's data file is located, and select the file.

Step 2: Select your file (This may take a few minutes depending on the size of your upload. If you are unable to upload a data file this could be due to an issue with you're company's firewall. If you encounter this issue be sure to speak to your Network Administrator or IT professionals to resolve it. )

Choose File File Upload.txt

Step 3: Continue to Next Step

Continue

Verify this is the correct file

The name of the document you chose for uploading will appear next to the "Choose File" button so you can ensure you have selected the correct document. If the file is correct, click "Continue" to move to the next step.





## Errors and warnings

There are four possible results to the test.

1. There are errors and warnings in your file.
2. There are errors in your file.
3. There are warnings in your file.
4. There are no errors or warnings in your file.

These results will be accompanied by a list of errors and or warnings in the data file you chose for testing. You must correct the *errors* in the file before uploading. The *warnings* can be corrected either in the file or later in the electronic system. All records without warnings or errors are marked as “OK.”



## Errors and warnings

Go through the list of errors/warnings and correct them in the original file for upload.

Back to Test File

Print This Page

\*\*\*\*\*

You will See 'ERROR'/'WARNING' messages reported from the system

\*\*\*\*\*

Line 1: **ERROR - Trying to upload Invalid Data**

\*\*\*\*\*

Total Establishment Reports OK are : " 0 "

Total WARNINGS are : " 0 "

Total ERRORS are : " 1 "

\*\*\*\*\*

Back to Test File

Print This Page

Need help with errors? Read the “EEO-1 Data Upload Error Fact Sheet” located on <https://www.eeoc.gov/employers/eo1survey/data-upload-errorcfm>



### Errors and warnings

At the bottom of the warning/error report, you can see the total count of establishment reports that are OK, that have WARNINGS, and that have ERRORS.

You can print this warning/error report for your reference by clicking the “Print This Page” button.

Back to Test File    Print This Page

\*\*\*\*\*

You will See 'ERROR'/'WARNING' messages reported from the system

\*\*\*\*\*

Line 1: **ERROR - Trying to upload Invalid Data**

\*\*\*\*\*

Total Establishment Reports OK are : " 0 "

Total WARNINGS are : " 0 "

Total ERRORS are : " 1 "

\*\*\*\*\*

Back to Test File    Print This Page

↑  
Click to test again

↑  
Click to print



## Errors and warnings

Before uploading the file for re-test, the records with errors must be corrected or removed from the file.

Click the “Back to Test File” button to re-test the data file once you have corrected the errors in your file.

### NOTE

If you remove the records with errors from your file they must be entered manually using the online form’s filing method. (See [Screen 61](#)).



## Errors and warnings

Once you have fixed all of the ERRORS in your file and uploaded it for testing again, you might still have some WARNINGS. This will not impede your ability to upload the file. However, you will still have to fix these warnings in the online form before certifying your report.



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## Errors and warnings

Once all of the ERRORS have been fixed in your file, scroll to the bottom of the ERRORS/WARNINGS screen and click “Continuing to the next step” to load the data from your file into the online EEO-1 online system.

Error Free

\*\*\*\*\*

Total Establishment Reports OK are : " 1 "

Total WARNINGS are : " 1 "

Total ERRORS are : " 0 "

\*\*\*\*\*

Back to Test File    Print This Page

Continue to Next Step

Click to continue



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# Step 1: Data Upload

Screen 55

## Reviewing uploaded information

On this page you will be able to see information about the establishments that were included in your data file.

EEO-1 Data File Upload

**Report Status**

Status	Description
I	Incomplete due to Warnings in Error Report. Establishments marked incomplete must be corrected after continuing to the next step and before certifying.
C	Complete

Your data has been tested and is ready for the next step. However, once you continue, you will not be able to upload data for these establishments again. **You will still be able to edit the data manually using the online system.** Additionally, you will still need to certify the report. Do you want to continue?

☐ Yes, please continue.

**Continue To Next Step**

Status	Type	Establishment Number	Year	Establishment Name	Street	City	State	Total
I	2	7558861	2017	HEADQUARTERS	1595 SPRING HILL ROAD	VIENNA	VA	486
I	3	7558861	2017	HEADQUARTERS	1595 SPRING HILL ROAD	VIENNA	VA	306
C	4	NEW0014	2017	SALES CENTER	1595 SPRING HILL ROAD	MCLEAN	VA	180

## NOTE

Once you click “Continue to Next Step,” you will *not* be able to upload data for the establishments listed on this page again. But, you *will* be able to edit the data manually using the online form, and you still have to CERTIFY the report.



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## Reviewing uploaded information

Once you have reviewed the information on this page, read the disclaimer message, check the “Yes, please continue” box and click “Continue to Next Step.” *THIS WILL ONLY UPLOAD YOUR DATA TO THE EEO-1 ONLINE SYSTEM. You still have to CERTIFY your report!*

Your data has been tested and is ready for the next step. However, once you continue, you will not be able to upload data for these establishments again. **You will still be able to edit the data manually using the online system.** Additionally, you will still need to certify the report. Do you want to continue?

☒ Yes, please continue.

**Must be checked to continue**

Continue To Next Step

**Click to continue**




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# Step 3: Data Upload

## Reviewing uploaded information

You will now see your data in the online filing system's "Edit EEO-1" screen. You can add, delete, or modify any information present on this screen manually. You must process all establishments marked with a  for incomplete.

### Edit Establishments

When you are ready to complete information for a specific establishment please select "Edit" from the drop down menu located directly to the left of the establishment number you would like to edit and press the "Go" button located next to this drop down menu.

**Delete Establishment:**  
If you need to delete an establishment please select "delete" from the drop down menu located directly to the right of the establishment number you would like to delete and press the "Go" button located next to this drop down menu.

**Add New Establishments:**  
If you need to file for a new establishment please [click here](#)

Filter By Report Types ⓘ

Select All

Filter By Report Status ⓘ

Select All

Show 50 entries

First Previous 1 Next Last

Search:

Showing 1 to 2 of 2 entries

Type	Status	Action	Est number	Est Name	Street	City	State	Emp Count
2		Edit Go	GX94201	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	
3		Edit Go	GX94201	TEST SITE	14601 SNELLING ROAD	SNELLING	CA	



## Certifying

Once all establishments are marked as complete, a message will appear on the top of the screen, asking you to certify. Click “Certify Reports” to proceed with certification.

You have completed data for all establishments. Please view the consolidated report to check for accuracy. Once you have finished adding establishments and your data is accurate, please press the Certify Reports button

Certify Reports

Click to proceed with certification



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### Certifying

The certification screen will present you with a summary of your survey and a statement of certification. Check the box stating that the information you provided is accurate, then click “Certify” to finalize your EEO-1 Survey.

Certifying Official	LINDSAY GREENSTONE
Title	SR HRIS
Total Number of Reports	3
Total Number of Closed Establishment	4

☐ Check this box if you feel that your company will not meet the criteria for next year's survey. You will NOT receive EEO-1 survey material in the mail.

Certification

☐ All statements are accurate and were prepared in accordance with the instructions.

Cancel

Certify

All reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.

You **MUST** click the “Certify” button to submit your report, or it will be considered incomplete and therefore unacceptable for submission.





### Certifying

When you see the following screen, you will know your report has been completed and certified. Your obligations for the EEO-1 Survey have been met.

#### Thank You!

Thank you for completing the EEO-1 Report. Your use of the online version is greatly appreciated.

[Main Menu](#)

It is suggested that you print a copy of the EEO-1 reports for your records. If you wish to do so, the button below will direct you to a screen that allows you to print this year's completed EEO-1 forms. There is an option to print the forms in both PDF and HTML format. If, after reviewing your reports, you find an error, please call our toll free customer service number at 1-877-392-4647.

[Print Reports Screen](#) [Log Out](#)



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# Filing Via the “Complete Online Form Method”

## Screens 61 – 106

# Step 1: Complete Online Form

Screen 62

## Establishment list screen

If “Complete Online Form” is selected, you will be taken to a screen with a list of your establishments.

Type ^	Status ^	Action ^	Est Number ^	Est Name ^	Street ^	City ^	State ^	Emp Count ^
2	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GE05951	TESTING CENTRAL	11491 SUNSET HILLS RD SUITE	VA	RESTON	
3	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GE05951	TESTING CENTRAL	11491 SUNSET HILLS RD SUITE	VA	RESTON	0
4	I	<input type="button" value="Edit"/> <input type="button" value="Go"/>	GX90856	332555555555555522	42918 BITTNER SQW	VA	ASHBURN	

## NOTE

If this is your company’s first time filing the EEO-1 survey, you will only see a Type 2 and 3 report. You will be able to add your other establishments as needed. Also, the Type 2 and 3 report will show the same establishment number, name, and address, but both reports are different. See [Screens 65 – 73](#) for report type info.



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## Establishment list screen

If your company is a single-establishment (i.e. only has one establishment/location), you will see only one report listed as a Type 1 report. You are only required to fill out this one report.

You will not see a listing of establishments; instead, the system will guide you through filing for your sole establishment.



## Establishment list screen

If your company is a multi-establishment (i.e. has more than one establishment/location), you must fill out a report for each of your establishments. To add a new establishment, refer to [Screens 87 – 92](#).



## List of report types

**Type 1** – Single-establishment report; used only for companies that have one establishment/location.



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## List of report types

**Type 2** – Consolidated report; contains the total employee breakdown for all of your establishments combined.



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## List of report types

**Type 3** – Headquarters report; contains the employee breakdown for *only* your headquarters establishment.



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## List of report types

**Type 4** – For an establishment with more than 50 employees; contains a breakdown of the employee count.



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## List of report types

**Type 6** – For an establishment with less than 50 employees; contains only the address and total number of employees for the establishment.

(See [Screen 72](#) for additional information regarding Type 6 reports).



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## List of report types

**Type 7** – Reconciliation report. This report will inform you if there are any data entry errors in your survey. This report is only applicable to you if you have any Type 6 reports.

See [Screens 102 – 104](#) for additional information regarding the reconciliation report.



## List of report types

**Type 8** – For an establishment with less than 50 employees; contains a breakdown of the employee count.

(See [Screen 72](#) for additional information regarding Type 8 reports).



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## List of report types

### NOTE

If you choose to do Type 6 reports, your numbers for your Type 3, 4, and 6 reports will not auto-populate the data entered into your Type 2 report. You will need to go into your Type 2 report and manually input all the data from each of your reports.

If you choose to do Type 8 reports, the numbers for all of your establishments will auto-populate the data-entered into your Type 2 report (and the system will prevent you from inputting the numbers yourself). **You can only do one or the other**



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## List of report types

To switch from a Type 6 report to a Type 8 report (or vice versa), send a request by email with your company ID number and contact information to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov)



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# Step 1: Complete Online Form

Screen 74

## Inputting your data

To begin filling out information for a report, under the “Action” heading select “Edit,” and then click “Go” for the establishment you would like to work on.

4		<div><div>Edit ▼</div><div>Go</div></div>	GX91460	THE ESTABLISHMENT	23232 ADDRESS ST	VA	FAIRFAX	
---	---	---	---------	-------------------	------------------	----	---------	--

Clicking “Go” here will take you to this specific establishment’s report.



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# Step 2: Complete Online Form

Screen 75

## Inputting your data

Establishment for which this report is filed* ⓘ		Employer Identification Number (EIN)* ⓘ	
<input type="text" value="TEST SITE"/>		<input type="text" value="66-9999999"/>	
<p>If you need to update the establishment's address, begin by entering the full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, or if you are entering a PO Box, please click on "Manual Address Entry" and enter the address in the provided cells.</p>			
Address (Use Manual Entry for P.O.Box)			
Address (number and street) - Note: Second line is optional.* ⓘ		Address 2 (Optional) ⓘ	
<input type="text" value="2315 ARCHDALE ROAD"/>		<input type="text"/>	
City or Town* ⓘ	County* ⓘ	State* ⓘ	Zipcode* ⓘ
<input type="text" value="RESTON"/>	<input type="text" value="FAIRFAX"/>	<input type="text" value="VA"/>	<input type="text" value="20191"/>
<input type="button" value="Manual Address Entry"/>			

Verify that the information in all fields are correct and click “Save and Continue.” If address is incorrect, click the address box to edit it (See [Screen 20](#) for more information on how to edit address).



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# Step 3: Complete Online Form

Screen 76

## Inputting your data

Enter your NAICS code in the box. Then click “Save and Continue.” If you do not know your NAICS code, see the following screen for guidance.

**North American Industry Classification System (NAICS)**  
Listed below is the six digit NAICS code on file for this Establishment. If the description best describes the major activity of your establishment, please press the "Save and Continue" button below.  
**Current NAICS Code is:**  

423210 - Furniture Merchant Wholesalers

Cancel Change Save and Continue

The North American Industry Classification System (NAICS) is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.



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## Inputting your data

You can search for your NAICS code by typing key words or numbers, and then selecting the option from the drop-down menu that best describes your establishment's industry.

Please search and build a six digit NAICS code for this Establishment by selecting the best one which describes the major activity of your establishment.

- 211120 - Crude Petroleum Extraction
- 211130 - Natural Gas Extraction
- 212111 - Bituminous Coal and Lignite Surface Mining
- 212112 - Bituminous Coal Underground Mining
- 212113 - Anthracite Mining
- 212210 - Iron Ore Mining**
- 212221 - Gold Ore Mining
- 212222 - Silver Ore Mining
- 212230 - Copper, Nickel, Lead, and Zinc Mining
- 212291 - Uranium-Radium-Vanadium Ore Mining
- 212299 - All Other Metal Ore Mining
- 212311 - Dimension Stone Mining and Quarrying
- 212312 - Crushed and Broken Limestone Mining and Quarrying
- 212313 - Crushed and Broken Granite Mining and Quarrying
- 212319 - Other Crushed and Broken Stone Mining and Quarrying
- 212321 - Construction Sand and Gravel Mining
- 212322 - Industrial Sand Mining





# Step 4: Complete Online Form

Screen 78

## Inputting your data

Input the correct number of employees for each relevant row and column.

Totals will add up on their own.

Job Categories	Number Of Employees														Overall Totals	
	Race/Ethnicity															
	Hispanic or Latino		Not Hispanic or Latino													
			Male						Female							
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races		
Executive/Senior Level Officials and Managers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
First/Mid-Level Officials and Managers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Professionals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Technicians	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Sales Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Administrative Support Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Craft Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Operatives	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Laborers and Helpers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Service Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Previous year total																



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## Inputting your data

If a category has no employees, you may leave the box blank or put a “0”.



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# Step 4-B: Complete Online Form

Screen 80

## Inputting your data

### EXAMPLE:

If the establishment has seven Hispanic/Latino males whose jobs categorize as “Executive/Senior Level Officials and Managers,” put “7” in column 1, row 1.

Job Categories	Number Of Employees														Overall Totals	
	Race/Ethnicity															
	Hispanic or Latino		Not Hispanic or Latino													
			Male						Female							
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races		
Executive/Senior Level Officials and Managers	7	0	0	0	0	0	0	0	0	0	0	0	0	0	7	



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# Step 4-C: Complete Online Form

Screen 81

## Inputting your data

### NOTE

After 15 minutes, the system will automatically log out unless you click the “Save” or “Save and Continue” button at the bottom. You can see your timer at the top left of the matrix.

Section will be closed if you do not hit **Save** or **Save & Continue** in **14** minutes and **38** seconds.

Job Categories	Number Of Employees														
	Race/Ethnicity														
	Not Hispanic or Latino														
	Hispanic or Latino		Male							Female					Overall Totals
	Male	Female	White	Black or American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	



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## Inputting your data

Clicking “Save” will save your work and restart the timer at the top of the page.

Clicking “Save & Continue” will save your work and take you to the next step.

Clicking “Cancel” will take you back to the screen containing your list of establishments without saving your progress.



## Inputting your data

**Government Contractor?**

Does the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to \$50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes?

☒ Yes ☐ No

If the response to the above question (C - 3) is Yes, please enter your Dun and Bradstreet identification number (if you have one): ⓘ

236-273-832

If the company has 50 or more employees AND a government contract of \$50,000 or more (or is a financial institution), select “Yes.” If not, select “No.”

If you selected “Yes,” enter your establishment’s Dun and Bradstreet identification number if you have one. This number is a unique nine-digit identifier for businesses used to establish a business credit file, which is often referenced by lenders and potential business partners to help predict the reliability and/or financial stability of the company in question.





## Inputting your data

Select the dates of the payroll period used for the report. The dates used should encompass the start date of the desired pay period and the end date of the desired pay period. The starting date must be earlier than the ending date.

Date(s) of payroll period used:

October ▼	23	2017	to	October ▼	30	2017
-----------	----	------	----	-----------	----	------

## NOTE

You may only use data pulled from any one payroll period in October, November *or* December of the reporting year





## Inputting your data

### Remarks

Use this area to give any identification data appearing on last report which differs from that given., explain major changes in composition of reporting Establishments and other pertinent information.

200

Characters remaining


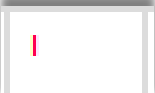
The Remarks section is to add anything you feel is noteworthy regarding the establishment. Otherwise, you may leave it blank.



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## Inputting your data

Finally click “Save and Continue.” You will be taken back to the page with your list of establishments. Under the “Status” column for the establishment you finished, you will see a  for “Complete.” Reports with an  for “Incomplete” will need to be completed.

\*If you are a single-establishment company when you click “Save and Continue,” you will be taken to certification ([Screen 99](#)).



## Adding a new establishment

If your company has new establishments/locations, you must file for those establishments as well.

### NOTE

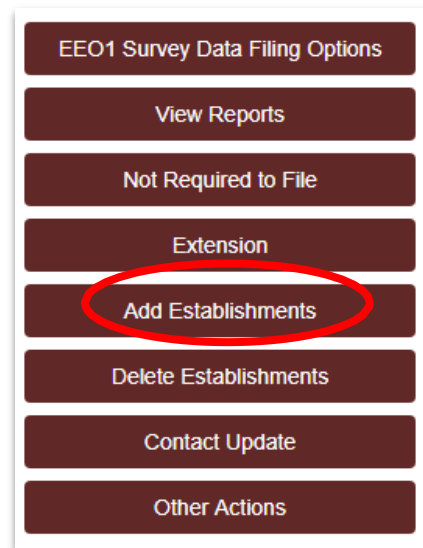
If the establishment was obtained by an acquisition or merger, you must follow a different process. See [Screens 118 – 123](#) for instructions regarding an acquisition or merger



## Adding a new establishment

There are two ways you can add a new establishment:

The first is from the main menu screen right after you log in. Select the ‘Add Establishments’ button.



# Step 1-B: Complete Online Form

Screen 89

## Adding a new establishment

The second is from the screen with your list of establishments. From the main menu after logging in, click “EEO1 Survey Data Filing Options” and select “Complete Online Form.” Near the top under the section “Add New Establishments,” click the button that says “click here.”

**Edit Establishments**

When you are ready to complete information for a specific establishment please select "Edit" from the drop down menu located directly to the left of the establishment number you would like to edit and press the "Go" button located next to this drop down menu.

**Delete Establishment:**  
If you need to delete an establishment please select "delete" from the drop down menu located directly to the right of the establishment number you would like to delete and press the "Go" button located next to this drop down menu.

**Add New Establishments:**  
If you need to file for a new establishment please [click here](#)

Filter By Report Types ⓘ  
Select All

Filter By Report Status ⓘ  
Select All

show 50 entries

First Previous 1 Next Last

Search:

Showing 1 to 3 of 3 entries

Type	Status	Action	Est number	Est Name	Street	City	State	Emp Count
2	I	Edit Go	GX94201	TEST SITE	14501 SNELLING ROAD	SNELLING	CA	552
3	I	Edit Go	GX94201	TEST SITE	14501 SNELLING ROAD	SNELLING	CA	



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## Adding a new establishment

### Add Establishments

Do you have any new establishments?

☒ Yes ☐ No

Select the report type that applies to the location you are adding.

Greater than 50 employees.

Type	Description
<input checked="" type="radio"/> 4	Individual establishment with more than 50 employees.

Less than 50 employees.

Type	Description
<input type="radio"/> 8	Individual establishment with less than 50 employees. This report is the same as a Type 4 report and requires the listing of employees under the correct gender, race and job description category. The totals from these reports will automatically be calculated for the Consolidated Report.
<input type="radio"/> 6	Individual establishment with less than 50 employees. This report requires only the address and total quantity of employees for each establishment. Also, when using Type 6 reports, the consolidated Type 2 report must reflect the total amount of employees from all your locations.

Select a type of report to fill out. The number of employees in the establishment you are adding will determine what type of report you should choose. (For more information regarding report types, refer to [Screens 65 – 73](#))





## Adding a new establishment

Has an EEO-1 report been filed for this Establishment in the past?

☐ Yes ☒ No

[Continue](#)

If you have filed a report for this establishment in the past and have the establishment number for it, click “Yes,” then enter the number into the box that appears, and click “Continue.”

If you have not, click “No” and then “Continue.” The establishment will be marked as “New” and will receive an establishment number at a later date.



### Adding a new establishment

Enter the establishment's name, EIN, and NAICS code. See [Screen 20](#) for more information on inputting your company address.

Click “Save And Add Another” to add another establishment, or “Save,” if that is the only one.

The screenshot shows a web form titled "Establishment for which this report is filed". It includes fields for "Establishment Name", "Employer Identification Number (EIN)", and "Naics" code. Below these is a section for "Address" with a "Manual Address Entry" option. At the bottom are buttons for "Cancel", "Save", and "Save And Add Another".

Establishment for which this report is filed

Please enter your Establishment Name

Employer Identification Number (EIN)

Naics ( For reference click here to view NAICS Codes.)

XX-XXXXXXX Search Naics code

Begin entering the establishment's full address in the Address 1 cell. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select you address to continue. If the correct address does not appear, or if you are entering a PO Box, please click on "Manual Address Entry" and enter the address in the provided cells.

Address (Use Manual Entry for P.O.Box)

Address (number and street) Address 2 (Optional)

Enter a location

City or Town County State Zipcode

Manual Address Entry

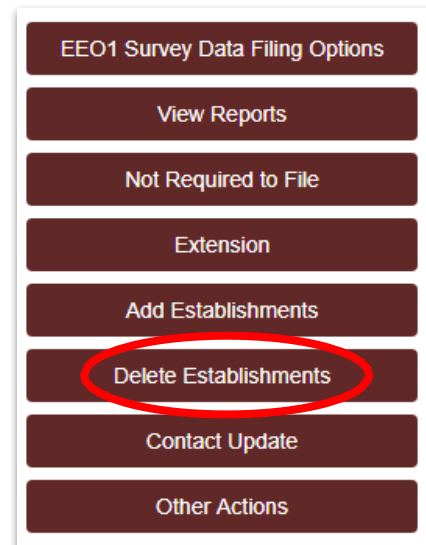
Cancel Save Save And Add Another



## Deleting an establishment

There are two ways you can delete a new establishment:

The first is from the main menu screen right after you log in. Select the “Delete Establishments” button.



## Deleting an establishment

From there, you will be asked if your company has closed any establishments since the previous survey year

1. Has your Company closed any establishments since last survey filling?

☐ Yes ☐ No

Select “Yes,” and a list of your establishments will appear Click the boxes next to the establishments you would like to delete, and from the dropdown menu underneath the box, choose the reason that best answers why the establishment is closed. When you’re done, click “Save,” and the establishment will be deleted.



# Step 2: Complete Online Form

Screen 95

## Deleting an establishment

The second deletion method is from the screen with your list of establishments.

From the main menu after logging in, click “EEO1 Survey Data Filing Options” and select “Complete Online Form.” Under the “Action” column next to the establishment you want to delete, click the dropdown menu and select “Delete.” Then click the “Go” button.

4	I	<div>Delete ▼</div>	Go	GX91608	TEST ENTERPRISE TECHS	2070 NORTHBROOK BLVD SUITE A 1	SC	CHARLESTON	89
---	---	---------------------	----	---------	-----------------------	--------------------------------	----	------------	----



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## Deleting an establishment

This Establishment will be marked as closed. Please choose one of the five closure types.

<input type="radio"/>	Establishment Closed/ Establishment is Out of Business.
<input type="radio"/>	This Establishment has been spun-off and is now independent of this company.
<input type="radio"/>	This Establishment was involved in an acquisition or merger.
<input type="radio"/>	Closed as Type-4 and Reported in Type6.
<input type="radio"/>	This Establishment was consolidated into another Establishment. a) Due to NAICS/EIN/Address issue. b) Due to company restructuring. c) Due to deletion of teleworker to be placed into Establishment they report to.

Select the best reason for the establishment closing, then click “Mark as Closed.” The establishment will now be deleted.





## Deleting an establishment

### NOTE

For both deletion techniques, you will not be able to delete your Type 2 consolidated report or your Type 3 headquarters report.



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## Certification

You have completed data for all establishments. Please view the consolidated report to check for accuracy. Once you have finished adding establishments and your data is accurate, please press the Certify Reports button

Certify Reports

On the page with your list of establishments, if all of your reports have been marked as complete, you will see this message at the top of the screen. Click the “Certify Reports” button to proceed with certifying your reports.



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## Certification

Certifying Official	TEST
Title	TEST
Total Number of Reports	1
Total Number of Closed Establishment	0

Certification
<input type="checkbox"/> All statements are accurate and were prepared in accordance with the instructions.
<div>Cancel Certify</div>
All reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on this reports are punishable by law, U.S. Code, Title 18, Section 1001.

Verify that all the information shown on this page is correct. If you need to edit the certifying official information, you may do so by going to the main menu and clicking on the “Contact Update” button.



## Certification

Before checking the box to certify your survey, please note all reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on these reports are punishable by law, U.S. Code, Title 18, Section 1001.



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## Certification

Finally, check the box certifying that all data inputted is accurate, then click the “Certify” button. Your EEO-1 survey will now be complete!



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If you currently have any Type 6 reports, a reconciliation report will appear in your list of establishments to show you if there are any errors in the data you have inputted in the matrices.

The reconciliation report will not appear if you have chosen to do Type 8 reports.





# Step 1: Reconciliation Report

Screen 103

To see where any errors are, click the “Go” button under the “Action” column for the reconciliation report. You will be taken to a matrix that shows the breakdown of these errors.

You cannot enter data into this grid. Data is automatically calculated based on data entered to the other reports.

Job Categories	Number Of Employees														Overall Totals
	Race/Ethnicity														
	Hispanic or Latino		Not Hispanic or Latino												
	Male							Female							
	Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or More races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	
Executive/Senior Level Officials and Managers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
First/Mid-Level Officials and Managers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Professionals	-	-5	-	-	-	-	-	-	-	-	-	-	-	-	
Technicians	-	-	-	-	-10	-	-	-	-5	-	-	-	-	-	
Sales Workers	-	-	-	-	-50	-	-	-	-	-	-	-	-	-	
Administrative Support Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Craft Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Operatives	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Laborers and helpers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Service Workers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TOTAL	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Negative values in the table above indicates that individual reports do not add properly to your consolidated report.

In this example, under column 2, row 3, there are 5 Hispanic female technicians that appear to be missing.



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- It is best to go through your reports and ensure that any unaccounted for employees were not simply placed in the wrong category
- Remember that your Type 2 consolidated report must show the complete breakdown of employees from all of your establishments. As such, the total number of employees in your Type 2 consolidated report must equal the total number of employees from your Type 3, 4, and 6 reports combined.

Once you have fixed the data, the negative numbers in the reconciliation report matrix will be cleared, and you will be able to certify your reports.



## 25% deletion warning

Please answer 'Yes' or 'No' to describe why establishments were deleted.

1. Was at least one establishment deleted due to being a spinoff?

☐ Yes ☐ No

2. Was at least one establishment deleted due to being sold to, merged into, or acquired by another company?

☐ Yes ☐ No

3. Does at least one establishment deleted still exist and have at least one employee working there on a regular basis? (Excluding residential teleworkers)

☐ Yes ☐ No

4. Were all of these establishments deleted due to being closed, out of business, loss of contract, or restructuring of the company?

☐ Yes ☐ No

Next

Cancel

Close

If you have deleted 25% or more of your company's establishments, this screen will appear when you attempt to certify your reports.

Answer the questions to ensure that the establishments were correctly deleted, then click "Next."



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## Multi-establishment to single-establishment warning

Your report is not yet complete. This company is set up as a "Multi-Establishment Company." If additional establishments exist, please add them by pressing the Add Establishment button. If none exist, please call the number listed at the bottom of the page and notify the EEOC of this.

If you attempt to certify your reports, but only have a Type 2 and Type 3 report in your list of establishments, you will see a message on the screen stating that your reports are incomplete. If you only have the one location to report for, send an email to [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) stating this, so that you can be switched from a multi-establishment to a single-establishment in the EEO-1 online system.

If you have other establishments to report, refer to [Screens 87 – 92](#) to add these establishments.



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# Filing for the First Time

Screens 107 – 116

# Step 1: Filing for the First Time

Screen 108

## Navigate to registration page

If your company has never filed an EEO-1 survey, you will need to register your company in the EEO-1 online system.

Navigate to <https://egoveeoc.gov/eo1/registerjsp> to start your company's registration.

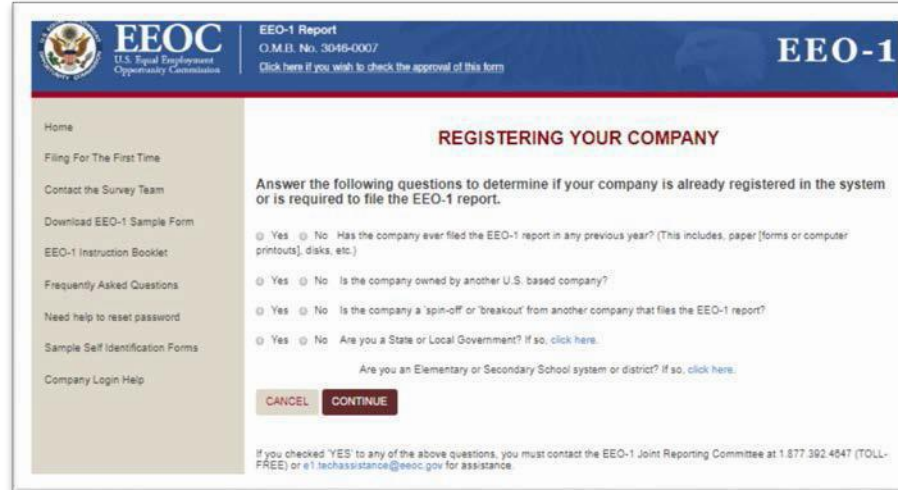


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## Registration questionnaire



The screenshot shows the EEO-1 Registration questionnaire page. The header includes the EEOC logo, the text "EEO-1 Report O.M.B. No. 3046-0007", and a link to check the approval of the form. The main heading is "REGISTERING YOUR COMPANY". Below this, it asks the user to answer questions to determine if their company is already registered or if it is required to file the EEO-1 report. The questions are:

- ☐ Yes ☐ No Has the company ever filed the EEO-1 report in any previous year? (This includes, paper [forms or computer printouts], disks, etc.)
- ☐ Yes ☐ No Is the company owned by another U.S. based company?
- ☐ Yes ☐ No Is the company a 'spin-off' or 'breakout' from another company that files the EEO-1 report?
- ☐ Yes ☐ No Are you a State or Local Government? If so, [click here.](#)

Below the questions, there is a link: "Are you an Elementary or Secondary School system or district? If so, [click here.](#)". At the bottom, there are two buttons: "CANCEL" and "CONTINUE". A note at the bottom states: "If you checked 'YES' to any of the above questions, you must contact the EEO-1 Joint Reporting Committee at 1.877.392.4647 (TOLL-FREE) or [e1.techassistance@eeoc.gov](mailto:e1.techassistance@eeoc.gov) for assistance."

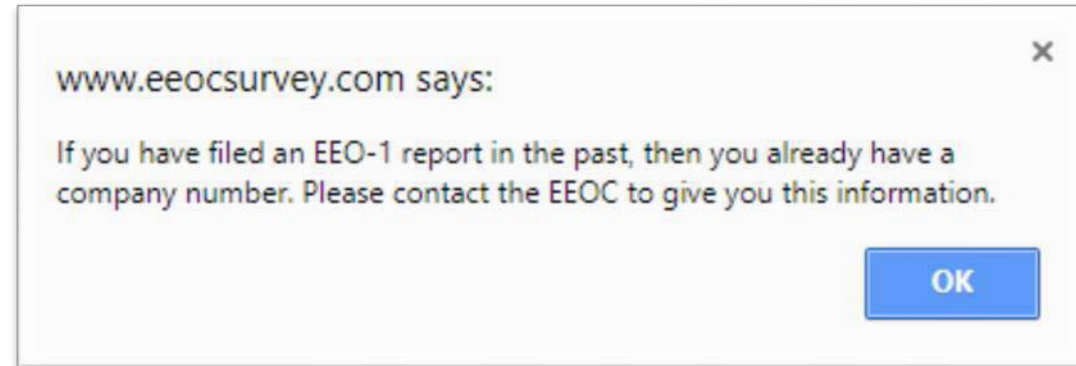
Answer the following questions, then click “Continue.” Your answers to this page will determine if your company is already registered or if it is required to file the EEO-1 survey.

The system will not let you continue if you select “Yes” for any of the questions. A message will pop up explaining why.



## Registration questionnaire

Answering “Yes” to the first question:



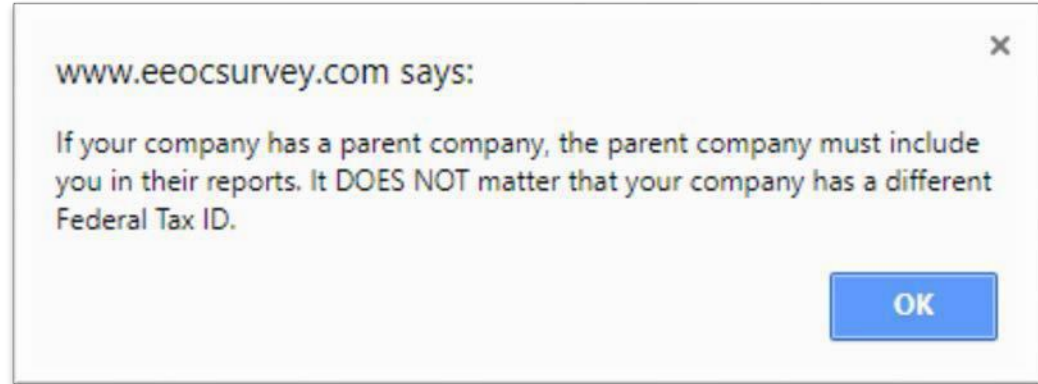
Reason: If your company has filed an EEO-1 report in the past, you do not need to register the company again.

If you do not know your login information, you can obtain this information by going to the login page at <https://egoveeoc.gov/eo1/login.jsp>. Click on “Forgot Password?” to get your password, and “Forgot Company Number?” to get your company number



## Registration questionnaire

Answering “Yes” to the second question:



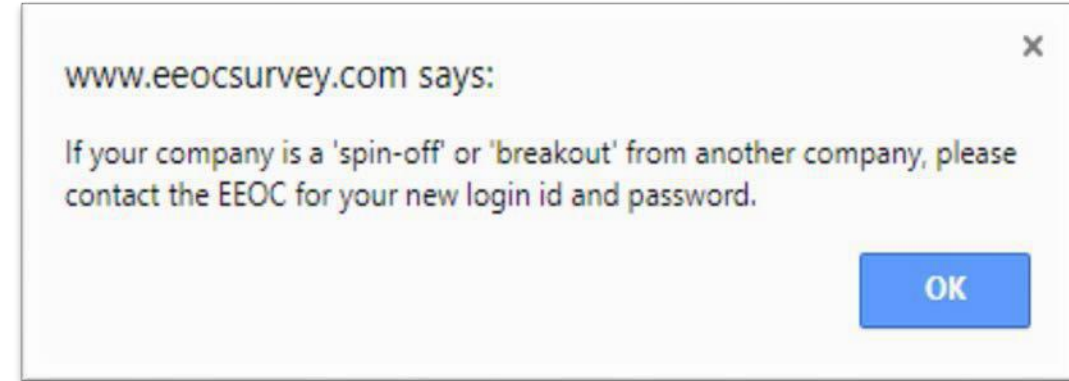
Reason: If your company has a parent company, your parent company is responsible for filing for your company under their own EEO-1 survey, even if both companies have different Federal Tax IDs.

If your company is now completely independent from your parent company, please refer to [Screens 124 – 125](#) regarding spinoffs.



## Registration questionnaire

Answering “Yes” to the third question:



Reason: If your company has spun off from another company and is now completely independent of them, you will need to contact the spinoffs department. Refer to [Screens 124 – 125](#) regarding spinoffs.



# Step 2-D: Filing for the First Time

Screen 113

## Registration questionnaire

Answering “Yes” to the fourth question:



Reason: If your company is a part of the state or local government, or is an elementary or secondary school, you are not required to do the EEO-1 survey. You will be responsible for a different survey altogether.

☒ Yes ☐ No Are you a State or Local Government? If so, [click here](#)

Are you an Elementary or Secondary School system or district? If so, [click here](#).

Click this for more information if you are a state/local government.

Click this for more information if you are an elementary/secondary school system.



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## Registration questionnaire

**REGISTERING YOUR COMPANY**

Answer the following questions to determine if your Company is required to file the EEO-1 report.

☐ Yes ☐ No Does the company employ 100 or more employees?

☐ Yes ☐ No Does the company have over 50 employees and has a federal contract or subcontract amounting to \$50,000 or more?

☐ Yes ☐ No Does the company have over 50 employees and serve as an issuing and paying agent for U.S. Savings Bonds?

After passing the initial questions to see if you should register your company, you must answer a second set of questions that will determine if you are required to file the EEO-1 report for the year. Answering “Yes” to any of the three questions means you are required to file. Click “Continue” to proceed with registration. Answering “No” for all three questions means you are not required to file. You do not need to do anything else.





# Step 4: Filing for the First Time

Screen 115

## Registration form

**REGISTERING YOUR COMPANY**

This registration is for the 2017 survey period. If you do not plan to file 2017 reports, do not submit this form. After clicking "Submit," your Company Number/Login ID will appear on the following screen. Be sure to save that information.

COMPANY INFORMATION:

Company Name \*

Please provide your mailing address below. As you enter your address, suggestions will be provided. Continue to add information until your address appears in the drop-down list. Select your address to continue. If the correct address does not appear, please click on "Manual Address Entry" and enter the address in the provided cells. For PO Boxes please use Manual Address Entry.

Address (Use Manual Entry for P.O.Box)

Address Line 1 \*  
ENTER A LOCATION

Address Line 2 (Optional) \*

City or Town \* County \* State \* Zip Code \*

Manual Address Entry

Employer Identification Number (EIN) \*

Number of locations for your Company \*

CONTACT INFORMATION FOR YOUR EEO-1 REPORT:

Name \* Telephone Number \*

E-Mail \* Confirm E-Mail \*

REGISTERING PERSON INFORMATION:

Name \*

☐ I'm not a robot

Cancel Submit

Fill in the fields regarding your company's information, and company's contact person information. The contact person serves as your company's contact for all things regarding the EEO-1 survey. See [Screen 20](#) for more information on inputting your company address. When done, click the "Submit" button.

After you click "Submit," your company number/login ID will appear on the following screen. Be sure to save that information before leaving that screen as it will not appear again. If you need your company number again, you will need to follow the steps in [Screens 10 – 11](#).



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## Registration confirmation

You will be taken to a page confirming your company's successful registration. You may print this information for your records by clicking the "Print This Page" button.

### EEO-1 Registration Confirmation

Congratulations! You are now ready to begin your EEO-1 Survey. Please PRINT and KEEP a copy of this screen for your records.

Please check your email to obtain your password for logging in to the EEO-1 Survey

Company Name	: TEST WORLD
Company number	: GX93038
Address	: 11254 LEESBURG PIKE, HERNDON, FAIRFAX, VA-20170
Contact person	: MR. TEST
Contact phone	: (457) 891-5555
Contact email	: AGALVEZ@SAGECOMPUTING.COM
Registered By	: MR. TEST
Login Id	: GX9303

Print This Page

To begin filing your EEO-1 Survey, please click on the "Login" link. [Login](#)

To obtain your password, check your email for a link which you must click to create a new password (see [Screen 9](#) for more help with this).

Once you have your company number and password, you can click here to log in.



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# Appendix

Screens 105 – 121

Notes, Definitions, FAQs and Links

# Acquisitions and Mergers

## Acquisition

An acquisition is a corporate action in which a company buys most, if not all, of the target company's ownership stakes in order to assume control of the target firm.



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# Acquisitions and Mergers

## Acquisition

If your company has undergone an acquisition, send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV)

Your email should include the **name, address, and company number/login ID of both the acquiring and the acquired companies.**



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# Acquisitions and Mergers

## Acquisition

If a company acquired a small company that otherwise would not be required to file the EEO-1 report, or a company that has not previously filed the EEO-1 report, the acquiring company may proceed with adding the establishment(s) as a new establishment.





# Acquisitions and Mergers

## NOTE

### Asset Acquisition vs. Acquisition

In an asset acquisition, only the assets of a company are purchased, rather than its shares.

If this is the case with your company, you do not need to report for that establishment/location.



# Acquisitions and Mergers

## Merger

A merger is a legal consolidation of two entities to form a new entity.



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# Acquisitions and Mergers

## Merger

If your company has undergone a merger, send an email to [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV).

Your email should include the names and company numbers/login IDs (if known) of all companies affected by the merger, the name and address of the corporate headquarters and the name of the new company.



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# Spinoffs

A **spinoff** occurs when an establishment(s) from one company forms a new company that will file independently from its former parent company.

If your company has undergone a spinoff, send an email to [E1.SPINOFFS@EEOC.GOV](mailto:E1.SPINOFFS@EEOC.GOV)



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# Spinoffs

Your email should include the name, address, and company number (if known) of the current parent company.

Additionally, please include the establishment considered to be the new headquarters that should be spun off in the employer EEO-1 database with a list of all physical addresses for the new company.



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## Regarding PEOs

A **Professional Employer Organization (PEO)** provides services to employers allowing them to outsource management, payroll and other activities associated with the employer to the PEO.

A PEO must report for all establishments of the companies they are filing for. They may not simply file a multi-establishment company as a single Type-4 establishment.





# Regarding PEOs

*Q. We are a PEO, do we file for our clients under our company as establishments or do we file for each as a separate entity with its own Company Number?*

**A.** As a PEO you will report your clients as establishments under the parent company, your PEO's Company Number.

*Q. As a PEO many of our clients are companies that do not meet the requirements to file individually. Should they be included in our EEO-1? If so, how should they be reported?*

**A.** Client companies of a PEO that on their own are not subject to EEO-1 filing requirements are excluded from the PEO's EEO-1 reports.



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# Regarding PEOs

**Q.** *Our PEO dropped service to a client, how do we treat this establishment?*

**A.** Establishments that previously had been reported by a PEO but no longer, and do not meet the requirements to file individual, must be deleted. If employees appear at these establishments later, assigned unit numbers that were deleted may be retrieved. However, if the establishment does meet the requirements to file you will need to contact [e1.spinoffs@eeoc.gov](mailto:e1.spinoffs@eeoc.gov)

**Q.** *Our PEO has several clients who we handle. These clients fall under our PEO EIN number and we report payroll and taxes for these client/employees. When submitting them on the EEO-1 report, do I use our company EIN number for ALL clients OR do I use the EIN number of each client when submitting the report?*

**A.** If the establishments fall under your PEO's EIN for payroll and taxes you will use the PEO's EIN for all establishments



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# Troubleshoot/FAQs

**Q.** *How do I change/update my contact person information?*

**A.** If your EEO-1 contact person information has changed, submit a letter on company letterhead signed by an authorized company representative, indicating the updated contact's name, title, phone number and email address to the EEO-1 Joint Reporting Committee at [E1.TECHASSISTANCE@EEOC.GOV](mailto:E1.TECHASSISTANCE@EEOC.GOV). Please remember to include your company number (if known) in your request.

**Q.** *When I try to log in, it says the information I entered is invalid.*

**A.** Double-check to ensure that you are inputting your password without any spaces in it (manually typing in your password can help). Additionally, remember that the password you used for the EEO-1 report in previous years will no longer work for the new reporting year. To obtain your new password for the year, please refer to [Screens 7 – 9](#).

**Q.** *Do public non-profit, tax-exempt establishments need to file the EEO-1 report?*

**A.** Yes.



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# Troubleshoot/FAQs

**Q.** *I'm trying to add a new establishment, but I got an error that says "Error: EIN already in use"*

**A.** This error means this same EIN is already in use by another company completing their EEO-1. Please email [E1.TECHASSISTANCE@EEOC.GOV](mailto:E1.TECHASSISTANCE@EEOC.GOV) with your company number/login ID and the establishment you are trying to create, along with the EIN you attempted to enter

**Q.** *I received two different login IDs for my company. Which one should I use?*

**A.** If you received two different login IDs, your company may have accidentally been registered in the system twice. Send an email to the acquisitions and mergers department at [E1.ACQUISITIONSMERGERS@EEOC.GOV](mailto:E1.ACQUISITIONSMERGERS@EEOC.GOV) with your contact information and both login IDs, and they will help correct the issue.

**Q.** *My employee regularly reports to two different establishments. Which establishment should I put them under?*

**A.** Report the employee to the establishment they spend the majority of their time in. If it is equal, you may choose which establishment to report them under. You may not report them in both establishments.



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# Troubleshoot/FAQs

*Q. How do I report for employees that work from home?*

**A.** Employees who telework, i.e. work from home, must be included in the EEO-1 report for the establishment to which they report. DO NOT indicate home addresses for these employees.

*Q. If my company is an employment/staffing agency, how should I report for leased employees?*

**A.** Leased Employee means a permanent employee provided by an employment agency for a fee to an outside company for which the employment agency handles all personnel tasks including payroll, staffing, benefit payments and compliance reporting. The employment agency shall, therefore, include leased employees in its EEO-1 report out of the establishment where their payroll is being handled. This will not include persons who are hired on a casual basis for a specified time, or for the duration of a specified job.

*Q. How do I account for seasonal or part-time employees?*

**A.** Part-time employees should be included in the EEO-1 report. Seasonal employees should not.



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# Troubleshoot/FAQs

*Q. If I have employees who regularly report to a physical establishment that my company does not own but just leases, do I still need to submit a report for that establishment?*

*A. Yes. Leased property locations are included. You will report those employees under that address.*

*Q. Can I submit a paper copy of my EEO-1 report?*

*A. An employer who claims that preparation or the filing of Standard Form 100 would create undue hardship may apply to the Commission for a special reporting procedure. In such cases, the employer must submit **in writing** a detailed alternative proposal for compiling and reporting information to: **EEO-1 Survey Coordinator, U.S. Equal Employment Opportunity Commission (EEOC), Office of Research, Information and Planning, Program Research and Surveys Division, 131 M St., NE, Washington, DC 20507**. Only those special procedures approved **in writing** by the Commission are authorized. *Paper EEO-1 forms will be generated on request only, in extreme cases where Internet access is not available to the employer.**



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# Troubleshoot/FAQs

**Q.** *What about employees who work at client sites?*

**A.** It has come to the EEOC's attention that there may be some confusion as to how employers are to report employees working at client sites

Some employers have been reporting the address of client sites for employees, while other employers have instead been rolling those employees up to a non-client site employer address.

Given this confusion, employers will not be considered “non-compliant” if they have chosen one approach over the other – either reporting by client site or by non-client site employer address.

EEOC is considering how to address client site reporting.



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# Additional Resources

EEO-1 Instruction Booklet

<https://www.eeoc.gov/employers/eeo1survey/2007instructions.cfm>

Questions and Answers: The 2017 EEO-1 Report

<https://www.eeoc.gov/employers/eeo1survey/faq.cfm>

EEO-1 Frequently Asked Questions and Answers (extended)

<https://www.eeoc.gov/employers/eeo1survey/2017-qanda.cfm>

Key Terminology and Definitions

<https://www.eeoc.gov/employers/eeo1survey/terminology.cfm>



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